Hoosier Management Information System Training Instructions

Community Access Networks and Family Development Matrix Programs

Before Attending a Training

- Before attending the training familiarize yourself with IHCDA's website, www.indianahousing.org. On the "Housing Opportunities" menu click on "HMIS/Continuum of Care" and read the section about the "Hoosier Management Information System (HMIS) as well as the HMIS Documents section. Familiarize yourself with all of the documents found in the Privacy and Security section, read the FAQ documents found under General Information, and check out the latest copy of our newsletter.
- For any new agencies coming on board, the Executive Director of your agency will need to read and sign the Agency Partner Agreement and the Addendum B found on our website. This should be done at least one week prior to attending training so that we can set up new programs in the HMIS software for your agency.
- Any staff using the system will need read and fill out the HMIS User Code of Ethics. Make sure you understand what you are signing. This document needs to be filled out prior to training so that your users can be set up in the system. The documents should be faxed to 317-232-7778.
- It is a pre-requisite for all CAN Network users that you attend a Matrix Life Area Training before attending the HMIS training. Case Managers who will be using Family Development Action Plans must also complete the eight-day Family Development Certification Course before attending the HMIS training. Contact your local United Way for information on upcoming classes.

During the Training

- You may be given a training pack which includes copies of the User Code of Ethics, the Notice of Privacy Practices, the Client Consent Form, and the Network Consent Form, as well as a copy of the paper Intake Form and the Intake Definitions. Users attending via GoToMeeting or GoToWebinar will be shown where to find these documents.
- Feel free to ask any questions you may have during the training. Make sure that you understand what is being demonstrated. Take enough notes that you will be able to go back to your office and do the things you learned.
- Make sure you have my business card or contact information before you leave.

After the Training

- Return to your office computer and bookmark the Indiana Housing website, www.indianahousing.org, as well the login screen for HMIS.
- Post the Notice of Privacy Practices at your agency where your clients can readily read it.
- Log into the database. If you were given a temporary password, you will need to change that password right away. The temporary password will be disabled.
- Practice doing a full intake using the Training Programs. Remember to change the program drop down to "Training Supportive Services Network Program". Do

not enter any real client data into the training program, use completely fake made-up information. Make sure you know how to add a referral source, external housing information, children's information, cash assistance, supportive services, referrals out, as well as how to close out the file when you are done working with a client.

- Begin entering real data into your program.
- Remember that only clients who agree to share information with the CAN Network Agencies should be put into the program labeled "Agency Name – CAN Network Program". Clients who do not agree to share their information with the CAN partner agencies can not be put into the CAN Network Program. We can set up a separate private non-network program if you want to enter those clients into HMIS.
- If you have any questions as you begin using the system please email me or call me right away. Do not stop using the system just because you forget how to do something.
- If something does not work the way you expect it to work, please use the Help Desk button to report the glitch.
- If you are an executive user at your agency, make sure you are able to run the reports you need. In addition it is also your responsibility to monitor the data quality of the staff at your agency to make sure they are doing everything correctly. Make sure all client records are being closed (discharged) for clients your agency is no longer seeing. If there are any changes in staff please notify me as soon as possible.

Let our staff know if you have any questions!

HMIS Staff
Kirk Wheeler, Project Consultant 317.709.3441 KiWheeler@ihcda.in.gov
Kelly Pickell, HMIS Manager 317.709.6447 KPickell@ihcda.in.gov
Suzy Grenough, HMIS Coordinator 317.730.2883 SGrenough@ihcda.in.gov

Attached:
- Beginner's HMIS Network Training Outline
- New User Cheat Sheet

Beginner's HMIS Network Training Outline

1. Introduction to ICHHI
2. Introduction to HMIS
- About HMIS
- Security and Confidentiality
- The Opening Menu
3. Client Lookup
4. Intake Process
   - 4a. The Intake Form
   - 4b. The Household/Child Form
   - 4c. External Housing Info
   - 4d. Cash Assistance
   - 4e. Referral Source
   - 4f. Referrals Out
   - 4g. Network Waiting List
5. Chart Records
   - 5a. Face Sheet
   - 5b. Progress Notes
   - 5c. Contact Logs
6. Services Menu
7. Discharge
8. Resources & Help
   - 8a. Help Menu
   - 8b. Messages Module
   - 8c. Announcements
   - 8d. Agency File Cabinet
   - 8e. Regional Rep Contacts

New User Cheat Sheet

https://inhmis.footholdtechnology.com/

Entering Clients from Intake to Discharge

1. **Start with Client Lookup** – Find out where they've been, how they were entered, and when they were put into the system.
2. **Intake/Admission** – First select the correct program! Search for your client using complete First Name, Last Name, and Social Security Number. Click Search/Create.
3. For existing clients click their name and Create New Record. For new clients click "Create New Application".
   Note: If the client is already in HMIS all of their information should copy over from their most recent stay. If it doesn't, make sure that you typed in their name and SSN exactly the way it was found under Client Lookup.
4. Fill in all required fields on intake screen plus the Life Area Assessment. Fill in any additional information that you may know. Click "Process Admission". Correct any error messages you may encounter.
5. **Consent Form** – The built in consent form is asking the client if they are okay sharing their demographic information with agencies outside the CAN Network.
6. **External Housing Info** – Enter their address and phone number.
7. **Household Child Form** – Enter information about their spouse, family members, and children.
8. **Cash Assistance** – If your agency gives cash/voucher assistance enter it in this section.
9. Switch between Data Entry mode to enter **Referral Source** (where they came from)
10. **Referrals to Other Providers** – to record referrals you are making.
11. **Network Waiting List** – to mark them as needing Case Management.
12. **Chart Records** – optional section to access case management services including Action Plans, Progress Notes and Contact Logs
13. When you are done working with a client, remember to **Discharge** them from the system. This takes them off your list of active clients. They can be readmitted when they come back again.